



Should I invest direct or take professional help?



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AMFI-Registered Mutual Fund Distributor

**Are Direct Mutual Funds
Cheaper?**

**The answer is
'Yes'**

Why are Direct Mutual Funds Cheaper?

Because you have to do it on your own by investing your time & effort.

What is the cost of time & effort?

You decide your cost for the time and effort you put in to manage your own investments. For some it is very expensive.

Investing is not a rocket science. Anyone can do it on their own.

Most investors may think they know everything but chances are they don't. They are expert in their own field, may not be in managing their investment portfolio.

**In long-term investing,
professional help is not
required.**

**Nothing is permanent. Investment
portfolio and market forces are also
dynamic. Situations change. Decisions
change. Constant reviews are
important. Not doing anything is also a
decision.**

HNIs manage their own portfolio.

Most HNIs hire / work with professionals and focus on their core activity which compensates them more for their time & effort.

***If portfolio size is small, costs are also insignificant.**

**Investors who have time
should manage their own
portfolio.**

**After a while, most DIY investors lose
interest & enthusiasm to review the
portfolio regularly which is essential
for optimum results.**

**Media and internet provides all
the information and tools to
manage one's own portfolio**

**Yes, it does. More than it
does, it confuses.**

It is easy to execute transactions. Everything is online. Help is not needed.

Yes, it is easy. But investing is not just about transacting. Also, imagine you being on a holiday or in an emergency. It could be quite a hassle then.

Capital gain reports can easily be downloaded from any software.

Yes. However, to ensure that all transactions are captured requires careful evaluation. It is not about reports, it is about perfect reports that you can trust.

One can start investing directly and if required, professional help can be sought later.

It takes years of relationship to develop trust & comfort. You just can't reach out to any random person when you need help. You have to invest in that relationship for long.

How to justify the cost.

Everything cannot be measured in cost. Remember, one good suggestion can recover your entire cost over a lifetime.

We will be happy to work with you.
We will do our best for you and
ensure that your interests are
always protected.

YOU CAN COUNT ON US

Sample
Thank You

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